APM 2007 Checklist
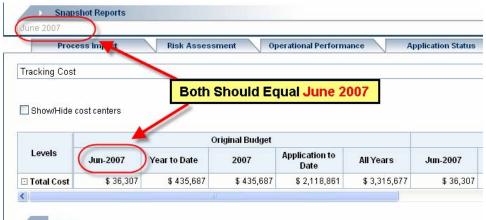
1) Enter FY 2007 (July 1, 2006 – June 30, 2007) Actual Costs
   a. Enter application in Edit mode
   b. Set **Application Status** field to 'Tracking' (if not already)
   c. Click **Update** to save
   d. Go to **Cost Tracking** tab
   e. Verify application 'Snapshot Report' month and 'Current Month' on **Cost Tracking** tab both equal 'June 2007'
      i. If they both are NOT equal to June 2007 STOP, call Charles Richards at 754-6612

   f. Drill down to Level 4
   g. Scroll to the right until you see the column heading for 'Actual Costs'
   h. Click on lightning bolt icon ( ) to enter actual costs for each applicable Level 4 cost category
   i. Click **Update** to save changes

2) Answer New Questions Added for 2007
   a. Enter application in Edit mode
   b. Fill in new fields (see Applications Attributes Configuration document for definitions):
      i. Required Fields
         1. Business Owner Name
         2. Business Owner Phone Number
         3. Business Owner Email
         4. Recovery Point Objective
         5. Communicable Disease Priority
         6. Application Availability
      ii. Optional Fields
         1. Number of Incidents Opened
         2. FTE Users
         3. Source Code Availability
   c. When finished update '**Last Complete Information Verification**' field with appropriate date
   d. Click **Update** to save changes

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3) Extend and Update an Application's Roadmap (if necessary)

   The last year in the application roadmap is tied to the year of the application's Retirement Date. To extend the roadmap just change the retirement date:
   a. Enter application in edit mode
   b. Click on the calendar icon ( ) next to the Retirement Date field
   c. Choose the new retirement date
   d. Click **Update** to save the changes
   e. Scroll down to the Application Roadmap section
   f. In the roadmap section you may have to scroll to the right to see the additional years
   g. Choose the appropriate decision for each of the new years as well as any existing years
   h. Click **Update** to save the changes

4) Add New Applications to Portfolio (if necessary)
   a. On the Builder screen (main screen) click the **Add** tab at the bottom of the screen
   b. **Add New Entity Wizard** window will pop up
   c. Set **Organizational Hierarchy** to 'Your Agency'
   d. Set **Select Entity** to 'Application'
   e. Click **Add Entity**
   f. Fill in fields with green asterisk (*) next to them
   g. Click **Add** at the bottom
   h. You will now have the ability to periodically save your progress by clicking **Update**
   i. Fill in the rest of the fields on the Application Info tab along with the Budget Cost, Strategic Impact, Architectural Fit, Risk Assessment, Operational Performance
   j. Change **Application Status** field to 'Tracking' and enter Actual application expenditures on Cost Tracking tab

5) Verify Existing Answers to Current Applications
   a. Enter application in Edit mode
   b. Verify answers for fields on the Application Info tab along with the Budget Cost, Strategic Impact, Architectural Fit, Risk Assessment, Operational Performance
   c. Update 'Last Complete Information Verification' date field
   d. For applications that have been Retired please verify that the following fields have been updated:
       i. Retirement Date is set to appropriate date
       ii. Roadmap value has been set to 'Retire'
       iii. There are no costs on the Budget Cost tab for years after an application has been retired
       iv. **Application Lifecycle Phase** has been set to 'Retired'